RFP 10-82
APPENDIX D
TECHNICAL PROPOSAL (Section 2.4)

2.4.1   Overview

The IN.gov News and events system should provide citizens insight into what the State of Indiana is doing. News and events calendar will provide a consistent and rapid way to inform Indiana citizens about date sensitive information. Executive Branch departments and agencies should put all news and events about their operations online and readily available to the public. A new Calendaring system would address the following issues:

- Calendar centric information is posted in multiple repositories. This causes the constituent to look in multiple locations to find information.
- Agencies are creating HTML pages and posting their events in bulleted listed. Data sensitive information cannot be searched for in this format.
- Agencies release date sensitive information via GovDelivery
- Some agencies have date sensitive information that they are statutorily responsible to post. This information needs to be visible from a top level IN.gov Web Calendar.

The State of Indiana currently has 73 agencies in the current Press and Event Calendar system. The agencies in the current calendar system make up a total 280 calendars (184 Press Release and 96 Event calendars). There are a total of 28,242 calendar entries in the Press and Event system to date. 25 agencies are outside the state calendaring system. 21 out of the 25 agencies outside the state calendaring system post unsearchable date sensitive information.

2.4.1.1 Current Calendar Issue

The major issue with the IN.gov Calendar is that it is not scalable.

Performance.   The RedDot Calendar system was not intended to handle the number of items and connections it has to parse through. As the number of events and connections increase, the performance of the application diminishes greatly.

- Current calendar is cumbersome to make updates. Every time an item is created (either for a small or large agency), it takes several minutes between hitting the 'Create Item' button and being able to enter information for that event or press release.
- The number of events in the system affects the performance. Occasionally, if a calendar or newsroom gets too large, it will not publish correctly. The only way to resolve this issue is to purge previous events.
- Basic functionality requires support team assistance. Agencies need assistance creating calendar for the next calendar year.
- Website errors occur frequently. If an agency publishes events for the months of January and March and nothing is published in February, the website will render errors.

Design & Navigation. The design and navigation of the RedDot Calendar system has hindered its acceptance in all Executive Agencies. IN.gov needs a calendar solution that reflects the colors, fonts and branding of each individual agency site. Every agency has a unique calendar display need. This calendar needs to Integrate fully with each site and reflects that sites organizational preference.

- The current RedDot Calendar solution only provides one view, by month. Multiple agencies have requested the ability to modify the view to Day, Week, Month or Year.
- The current RedDot Calendar system does not provide search functionality.
- The current RedDot Calendar system does not allow the agencies to filter the views by categories such as public meetings, seminars, performances, events, news releases, etc.
- Ability to view a calendar and select the date to view the calendar events for that date.
- Print view for a RedDot Calendar system is not available.

Reporting. The current Calendaring System does not provide any metrics as to its effectiveness. The next generation calendar tracks must be able to track:

- Portal Wide Visits to the Calendar
- Agency or Program specific calendar visits

2.4.1.2 Potential Business Case

Below are requirements identified within key agencies that are not being met by the current IN.gov Calendar system.

- The Indiana Department of Transportation announces the traffic restrictions on their calendar systems. These announcements include the beginning and ending date of the traffic restriction. These announcements are currently placed on the IN.gov web calendar. An advantage would be to allow the citizen to subscribe to the content. If the restriction is lifted or extended, the citizen would be notified by email or by text message.
- The **Bureau of Motor Vehicles** (BMV) created a HTML page that listed the schedule of where their BMV2You Mobile License Branch. With an enhanced calendar, BMV could have published this information in the calendar. The enhanced calendar would allow them to click on a link to map to the associated location.
- **Indiana Department of Tourism** has multiple festival and events that are scheduled every year. They could place these events in the calendar and make them repeating events.
- **The Department of Natural Resources (DNR)** currently publishes Adobe Acrobat version of their state park scheduled on their website (see http://www.in.gov/dnr/parklake/2420.htm). Each state park sends DNR an update PDF document every time the calendar is updated. They are not using the existing WebCMs calendar because it is cumbersome and not ideal for data entry by DNR field staff.

2.4.1.3 Calendar Organization – The current IN.gov Calendar system is divided into Press and Events. The desire for anew calendaring system anticipates a new hierarchical design based on calendar entry type, state categories and the entire State of Indiana government design.

2.4.1.3.1 IN.gov Calendar entry types - State of Indiana anticipates the following calendar entry types:

2.4.1.3.2 Deadlines	2.4.1.3.11 Seasonal Events
2.4.1.3.3 State Holidays	2.4.1.3.12 Fairs and Exhibitions
2.4.1.3.4 Public Meetings	2.4.1.3.13 Performances
2.4.1.3.5 News	2.4.1.3.14 Seminars/Workshops
2.4.1.3.6 Press Advisories	2.4.1.3.15 Pandemic Information
2.4.1.3.7 Announcements	2.4.1.3.16 Alerts and Notification
2.4.1.3.8 Legislative Hearings	2.4.1.3.17 Initiatives
2.4.1.3.9 Public Service Offerings	2.4.1.3.18 Things to do
2.4.1.3.10 State Personnel	

2.4.1.4 IN.gov Core Categories - State of Indiana currently categorize all agencies according to the following core categories:

2.4.1.4.1 About Indiana	2.4.1.4.6 Law & Justice
2.4.1.4.2 Agriculture & Environment	2.4.1.4.7 Public Safety
2.4.1.4.3 Business & Employment	2.4.1.4.8 Taxes & Finance
2.4.1.4.4 Education & Training	2.4.1.4.9 Tourism & Transportation
2.4.1.4.5 Family & Health	

2.4.1.5 Entire State of Indiana - The state of Indiana wants a develop a single calendaring system that comprises date sensitive information from all branches of government within the state.

2.4.1.5.1 Elected Officials	2.4.1.5.2.3 Branch Offices
2.4.1.5.1.1 Governor	2.4.1.5.3 Legislative
2.4.1.5.1.2 Lieutenant Governor	2.4.1.5.3.1 House of Representatives
2.4.1.5.1.3 Attorney General	2.4.1.5.3.2 Senate
2.4.1.5.1.4 Auditor	2.4.1.5.4 Judicial
2.4.1.5.1.5 Secretary of State	2.4.1.5.4.1 Supreme Court
2.4.1.5.1.6 Treasurer	2.4.1.5.4.2 Court of Appeals
2.4.1.5.1.7 Superintendent of Public Instruction.	2.4.1.5.4.3 Local circuit courts
	2.4.1.5.5 Local Government
2.4.1.5.2 Executive Branch Agencies (75)	2.4.1.5.5.1 Municipalities
2.4.1.5.2.1 Divisions	2.4.1.5.5.2 Cities/Townships
2.4.1.5.2.2 Programs	

2.4.2   Requirements

As an effort to provide citizens better insight into the undertaking of the State of Indiana a committee of interested representatives is soliciting proposals to provide online calendar to be used for listing date sensitive activities that pertain to State of Indiana Business. The calendar will be provided at no cost to the constituent.

Based on research and observations of other State calendaring systems, it has been determined that the State of Indiana will pursue a calendar from a third party. Requirements for the calendar have been modeled after existing functionality of the current online calendars and industry standards seen across researched calendaring systems in other government entities. In response to this RFP, each proposal response should be entered into the Technical Requirements Response Form, Attachment F.

The following is a list of required functionality and support needed by the State of Indiana. These requirements are prioritized: Primary, Secondary and Tertiary. Each Priority group is broken into the below sections:
- Security, Reliability, & Usability
- Calendar Structure
- Calendar Entry Creation
- Event Publishing
- Constituent Experience

2.4.2.1 Existing Calendar Functionality
2.4.2.1.1   The State of Indiana is currently using OpenText Content Management System which comes with an included calendaring system that was customized to meet the State of Indiana needs. Each calendar has an associated RSS Feed.
2.4.2.1.2   The state has 400+ users that are capable of making calendar entries.
2.4.2.1.3   73 Agencies currently use the OpenText Calendar system, but the goal of this system will be to include all Indian government branches of government
2.4.2.1.4   The states of Indiana currently consist of 280 Calendars. This number is made of of 73 agencies and some of those agencies having sub calendars. (e.g. the House of Representatives has 50 sub calendars)
2.4.2.1.4.1 184 Press and Release Calendars
2.4.2.1.4.2 96 Event Calendars
2.4.2.1.5   28,422 calendar entries
2.4.2.1.6   The state of Indiana currently hosts web HTML, .NET or Java application/content within Windows 2003-2008 or Apache environment.

2.4.2.1.7   The state of Indiana currently supports a Microsoft SQL Server 2005+ and Oracle 10g+

2.4.2.1.8   Supported browsers include Internet Explorer 6 or later.

2.4.2.2 *Primary requirements are the functionality the IN.gov calendar system currently provides and some additional functionality that are essential for the next generation calendar system.*

2.4.2.2.1   Security, Reliability & Usability

    2.4.2.2.1.1 Export Calendar Entries in multiple formats (e.g. HTML, Rich Text, .cvs, XML)

    2.4.2.2.1.2 Archiving and purging of old calendar entries

    2.4.2.2.1.3 Archiving and or purging attachments

    2.4.2.2.1.4 Self Service User Account Management (e.g. password reset, disable password, security questions)

    2.4.2.2.1.5 If **NOT** hosted by the State of Indiana

        2.4.2.2.1.5.1   Secure URLS

        2.4.2.2.1.5.2   Web Hosting

        2.4.2.2.1.5.3   Virtual Host Names

    2.4.2.2.1.6 If Software as a Service (SaaS)

        2.4.2.2.1.6.1   Provide Service Availability guarantee

        2.4.2.2.1.6.2   Provide Service Level Agreement (SLA) and mitigation strategy when SLAs are not met.

        2.4.2.2.1.6.3   Provide Security and privacy policies

        2.4.2.2.1.6.4   Backup and recovery capabilities

        2.4.2.2.1.6.5   Accountability for quality of service

        2.4.2.2.1.6.6   Integration capabilities

        2.4.2.2.1.6.7   Provide current customer list.

        2.4.2.2.1.6.8   System Response Time expectations

            2.4.2.2.1.6.8.1 .01-1 second: No special feedback is necessary except to display the result.

            2.4.2.2.1.6.8.2 2-5 seconds: Special feedback is required to indicate expectation of task completion

            2.4.2.2.1.6.8.3 The availability of the application will not affect the ability of the web page to load. In this event, a out of service would display in place of the SaaS widget.

        2.4.2.2.1.6.9   Provide Data Ownership Policy upon termination of contract.

2.4.2.2.2   Calendar level permissions:

    2.4.2.2.2.1 Administrator: Add, Edit, Delete Calendars

    2.4.2.2.2.2 Agency: Add, Edit, Delete Calendar entries

2.4.2.2.2.3 Limited users able to create calendars

2.4.2.2.2.4 Unlimited Users able to add, edit, and delete events

2.4.2.2.2.5 W3C compliant

2.4.2.2.2.6 508 Compliance

2.4.2.2.3   Calendar Structure

2.4.2.2.3.1 Use a Publisher Dashboard to track calendar and other widget views, most frequently viewed events, actions taken on events, and more

2.4.2.2.3.2 Events can be displayed based on constituent hits

2.4.2.2.3.3 Customizable Header and Footer with logo.

2.4.2.2.3.4 Ability to frame the calendaring system within the IN.gov Existing Look and Feel

2.4.2.2.3.5 Customizable views (day, week, month, year, list, classic table)

2.4.2.2.3.6 Customize colors, fonts

2.4.2.2.3.7 Control how multi-day events are displayed

2.4.2.2.3.8 Use the state existing style sheets

2.4.2.2.3.9 Basic search that will sort all the metadata of any calendar entry.

2.4.2.2.3.10 Advanced Search

    2.4.2.2.3.10.1 Keyword search

    2.4.2.2.3.10.2 Specific Date or Date Range

    2.4.2.2.3.10.3 By selecting single or multiple agencies

    2.4.2.2.3.10.4 By selecting single or multiple divisions under a agency

    2.4.2.2.3.10.5 By selecting single or multiple IN.gov core Categories

    2.4.2.2.3.10.6 By selecting single or multiple IN.gov Calendar Entry Type

    2.4.2.2.3.10.7 Customizable search criteria (including creating custom fields)

    2.4.2.2.3.10.8 Search by location or county

2.4.2.2.3.11 Widgets

    2.4.2.2.3.11.1 Popular events viewed

    2.4.2.2.3.11.2 Calendar for quick selection of multiple dates

    2.4.2.2.3.11.3 Date Picker for textboxes

    2.4.2.2.3.11.4 Widget can be created on any type of search value

2.4.2.2.3.12 Print friendly view

2.4.2.2.4   Calendar Entry Creation

2.4.2.2.4.1 Ability to add, edit, delete events

2.4.2.2.4.2 Select the Calendar Event Type

2.4.2.2.4.3 Import Events using CVS, XML, or database feeds

2.4.2.2.4.4 Ability to add attachments (Microsoft Office, PDF, Images (.jpg, .gif, .swf)

2.4.2.2.4.5 Ability to use HTML formatting in event description or notes

2.4.2.2.4.6 All calendars entries will roll up to the Top level IN.gov program page. Constituent must be able to delineate the differences of the calendar at the top level. Workflow and business rules will control which calendar entries flow to the top level IN.gov home page.

2.4.2.2.4.7 All calendars entries will roll up to one of the existing Core Categories as a calendar view for that category. As an example, Indiana State Policy and Department of Homeland Security calendar entries will all be visible in the Law and Justice Core Category. Constituent must be able to delineate the differences of the calendar at the top level

2.4.2.2.5 Event Publishing

2.4.2.2.5.1 Ability to setup multi-level security/Flexible hierarchical permission system

2.4.2.2.5.2 Ability to decide which events get published to the Core or Top level IN.gov Pages

2.4.2.2.6 Constituent Experience

2.4.2.2.6.1 View event details

2.4.2.2.6.2 Search for events by keyword

2.4.2.2.6.3 Filter events by category

2.4.2.2.6.4 Submit events (subject to your approval)

2.4.2.2.6.5 Subscribe to an RSS feed of your calendar

2.4.2.3 *Secondary requirements are requirements that have been identified as important to the majority of agencies. These requirements will contribute to statewide acceptance of a single calendaring system.*

2.4.2.3.1 Security, Reliability & Usability

2.4.2.3.1.1 Active Directory/LDAP Support

2.4.2.3.1.2 Calendar level permissions – The public can add calendar entries with agency or administrator approval

2.4.2.3.1.3 Ability to manage document attachments (e.g. automatically remove old attachments after a certain date)

2.4.2.3.2 Calendar Structure

2.4.2.3.2.1 Use parameters to display or link to a specific calendar view

2.4.2.3.2.2 Control the number of events per page

2.4.2.3.2.3 Control how events are grouped

2.4.2.3.2.4 Control time zone

2.4.2.3.2.5 Control when week and day display start

2.4.2.3.2.6 Control the display and order of fields

2.4.2.3.2.7 Control the display and order of fields

    2.4.2.3.2.7.1 Ascending/Descending date order

    2.4.2.3.2.7.2 Based on Category or calendar entry type

2.4.2.3.2.8 Choose whether to highlight new and updated events

2.4.2.3.2.9 Choose from a pre-defined holiday list

2.4.2.3.2.10 Social Media Integration (YouTube, Twitter, Facebook)

2.4.2.3.2.11 Support for mobility

2.4.2.3.3 Calendar Entry Creation

    2.4.2.3.3.1 Create repeating with exceptions (for example every Friday except June 1)

    2.4.2.3.3.2 Create an event by copying an existing event.

    2.4.2.3.3.3 Ability to add map link to event locations

    2.4.2.3.3.4 Ability to add application links

    2.4.2.3.3.5 Ability to add custom fields for calendar entry types

    2.4.2.3.3.6 Event Registration

        2.4.2.3.3.6.1 Send up online registration for events

        2.4.2.3.3.6.2 Send event invitations to groups

        2.4.2.3.3.6.3 Resend invitations to non-responders

        2.4.2.3.3.6.4 Track responses and add new contact to address book

        2.4.2.3.3.6.5 Export respondent list

2.4.2.3.4 Event Publishing

    2.4.2.3.4.1 Choose a default view and alternative views (day, week, month, year, list, classic table, form view and more)

    2.4.2.3.4.2 Ability to have the calendar content display in ascending or descending order.

    2.4.2.3.4.3 Ability to embed calendars and other interactive widgets into the state website

    2.4.2.3.4.4 Workflow approval of calendar entries

    2.4.2.3.4.5 Ability to submit events anonymously with state approval

2.4.2.3.5 Constituent Experience

    2.4.2.3.5.1 Choose a calendar view (day, month, year, classic table, list)

    2.4.2.3.5.2 Submit events with submission tracking/curse word/hate word filters

    2.4.2.3.5.3 Add events to personal calendars

    2.4.2.3.5.4 Set email message event reminders

    2.4.2.3.5.5 Arrange to be notified if events change

    2.4.2.3.5.6 Forward event information to friends

    2.4.2.3.5.7 Send event information by email or cell phone text message

    2.4.2.3.5.8 Download event information

    2.4.2.3.5.9 Subscribe to calendar email updates

2.4.2.4 _Tertiary requirements are requirements that have been identified as important to a few agencies; however, these requirements are not essential to the delivery of a new calendaring system._

2.4.2.4.1   Security, Reliability & Usability
    2.4.2.4.1.1 Workflow approval of calendar entries.
    2.4.2.4.1.2 Personalization
        2.4.2.4.1.2.1   Creating geo-targeted promotions
        2.4.2.4.1.2.2   Tuning the calendar based on visitor behavior
        2.4.2.4.1.2.3   Displaying recommendations list based on personas
        2.4.2.4.1.2.4   Segmenting and tagging calendar entries automatically for the right audience

2.4.2.4.2   Calendar Structure
    2.4.2.4.2.1 Support multiple languages
    2.4.2.4.2.2 Maintain a State address book with locations
    2.4.2.4.2.3 Assign color, icons or labels to State Categories and State Calendar Entry types

2.4.2.4.3   Calendar Entry Creation
    2.4.2.4.3.1 Insert Flash Media into the event
    2.4.2.4.3.2 Submission tracking/curse word/word filters
    2.4.2.4.3.3 Repeating events with Exceptions (For example every Friday Except June 1)

2.4.2.4.4   Event Publishing

    2.4.2.4.4.1 Choose to allow a calendar to have or not have overlapping events
    2.4.2.4.4.2 Choose from a pre-defined holiday lists of calendars. Edits should be allowed.

2.4.2.4.5   Constituent Experience
    2.4.2.4.5.1 Send cell phone text message event reminders
    2.4.2.4.5.2 Hide events that are not relevant (for example, in another geographic region)

2.4.2.5 Architecture Requirements
The Respondent must verify that the application conforms to all the applicable state (IOT) policies, standards and guidelines. Specifically, the respondent needs to validate that the application conforms to the Assistive Technology Policy (Section 508). This should be done by submitting a Voluntary Product Accessibility Template (VPAT) if already available or completing the Assistive Technology Compliance Evaluation Form (Attachment E)

2.4.2.6 Escrow

The Respondent must hold a copy of the source code in escrow to allow the state to continue to maintain the application in the event that the Respondent is no longer able to provide support.

2.4.2.7 Hardware/Software Requirements

The respondent needs to provide the minimum hardware and software configurations, including operating systems, required for the solution to run. This includes the both the client and the server environments.

2.4.2.8 Maintenance

The respondent must describe how maintenance will be applied. Maintenance included fixes and enhancements to the software. These can take the form of a service pack or a new release of the software.

2.4.2.9 New Version Cost

The respondent must identify the conditions under which there will be an upgrade cost for a new version that is not included in the maintenance and support cost. The Respondent must provide the historical frequency of this occurrence and the typical or current cost for a new version.

2.4.2.10 Support

The Respondent must identify how support will be provided. If it is through a help desk, the Respondent must provide the hours that it is available. The Respondent must identify if support is provided by a help desk, by telephone or by Internet access. The Respondent must provide the country of the help desk operators if they are overseas.

2.4.2.11 Training

The Respondent must provide a description of any user training that will provided and in what form (e.g., web-based, instructor led) it will be provided. The Respondent must identify if there is an additional cost for training that is not included in the cost proposal.

2.4.2.12 Disaster Recovery

The Respondent must provide a description of any user training that will provided and in what form (e.g., web-based, instructor led) it will be provided. The Respondent must identify if there is an additional cost for training that is not included in the cost proposal.